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THE EFFECTS OF THE PANDEMIC CRISIS ON TOURISM. A QUALITATIVE SURVEY ON THE OPINIONS OF TOUR OPERATORS IN SICILY

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Abstract

The COVID-19 pandemic crisis has had direct effects on social relationships. Tourism activities are by definition linked to the interaction among human beings, beginning with a physical movement of a person from a habitually-frequented environment to one or more destinations. Any denial of mobility, therefore, negates the tourist experience. After briefly discussing the effects of the COVID-19 crisis on the tourism system and hospitality, this work presents a qualitative survey by means of a thematic analysis approach. The study investigates tourism professionals operating in Sicily, across different tourism sectors and in various segments of the market (cultural, luxury, nautical, rural, and slow tourism). The operators were asked questions about their experiences of the pandemic, with its negative impact, and their expectations and prospects. The abilities to adapt to the new normal and build resilience are often related to offering sustainable products and services, which are characterized by a more robust relationship with the territory and local economy.

Keywords: COVID-19, Tourism, Hospitality

1. THE EFFECTS OF THE COVID-19 PANDEMIC ON TOURISM AND THE HOSPITALITY SECTOR

The COVID-19 pandemic erupted worldwide in the first few months of 2020 with far-reaching consequences and powerful effects on all human activities. One of the sectors which has suffered the most is that of *tourism*, as a human experience and economic activity. The COVID-19 virus directly affects the possibility of socially relating, at least physically (spreading contagion from human being to human being). Tourism activities are by definition linked to social aspects and interaction between human beings. And tourism interactions are primarily physical and social

interactions. Tourism arises with a physical movement of a person from a habitually-frequented environment to one or more destinations. The abnegation of this movement has, therefore, precluded the tourist experience (at least in its standard version).

Several articles focused on different aspects of the hospitality industry and tourism economics at the time of the Covid-19 pandemic, including issues related with travel behaviors and preference of customers, safety and health, market demand changes, loss of jobs, prospects for recovery of the hospitality industry, etc (Fotiadis, Polyzos, and Huan, 2021; Jeon and Yang, 2021; Wassler and Talarico, 2021; Qiu et al., 2020; Sharma, Thomas and Paul, 2021; Kock et al., 2020). The analysis of the extensive debate in the leading scientific journals revealed a variety of research approaches that have been used to investigate the hospitality industry and tourism sector (Davahli et al., 2020).

After discussing the effects of the crisis on the tourism and hospitality systems, this work presents a qualitative survey of tourism operators operating in Sicily in the various tourism sectors. By means of a survey, tour operators were asked probing questions regarding the current situation in the industry, and their expectations and prospects.

The motivation for this work has arisen from the need to engage with tour operators and those in the hospitality sector by asking them to recount their reactions in dealing with the crisis, including significant perceived threats. This engagement has occurred in the short- to medium-term where global vaccination programmes are beginning to bear fruit. Due in no small part to appropriate political decisions and local health infrastructure, opportunities for mobility and social interaction may finally be partially or fully restored, albeit at a differentially slow pace. That the effects of the pandemic crisis have severely affected the tourism industry cannot be denied, even if it would appear that they have merely accelerated changes already underway. These changes include: a growing demand for tourism linked to issues of environmental, social, and economic sustainability and a retraction from processes of tourism massification; and more scrupulous attention to the quality of the tourist experience, respecting the relationship between host and guest.

1.1. The international context and the prospects for recovery

The claim that the travel and tourism industry was one of the first sectors to be affected by COVID-19 is now evident. From March 2020, an entire value chain worldwide and in Italy entered a hitherto unknown critical state. This value chain defines the industry, and it includes: airlines, bus and rail companies, cruise companies, hotels, restaurants, tourist attractions, travel agents, tour operators, online travel agencies, etc. Indeed, the bankruptcies of the some major airlines and large tour operators have been widely documented and are now part of world economic history. Predictably, the effects of the crisis on small and medium-sized enterprises (SMEs) are even greater: they comprise approximately 80% of the economic activities linked to tourism and hospitality and, consequently, they risk bankruptcy as the pandemic continues into its second year.

The COVID-19 pandemic will undoubtedly leave a lasting imprint on the tourism and travel industry. The collapse of consumer demand, scarce liquidity reserves and the lack of access to flexible credit lines have forced many small tour operators to cease trading and they may well never reopen. Even larger companies will have to radically change their business model in the short-, medium- and long-term. However, it is too early to ascertain the qualitative and quantitative changes which will define the demand and supply of the tourism market in the short and long term. For example, it is difficult to predict which demand segments will markedly or marginally decline in the long term and which segments will enjoy a recovery. And this difficulty also regards trends in the prices of tourist services and how the quantity and quality of these services will evolve. There is a current paucity of information in this regard, which makes it difficult to make accurate predictions. The latter regard; the temporal distribution and intensity (in terms of

morbidity and mortality) of the global pandemic and the efficacy and efficiency of vaccination campaigns, at different paces and in different parts of the world.

In the absence of such predictions, it is, therefore, difficult to assess the economic and psychosocial impacts which the virus may have on the tourism industry, even after vaccine programmes are operating at maximum capacity. Even assuming the most optimistic case of many industrialised countries attaining effective vaccination resistance in 2021, restrictions on people's mobility are likely to remain in the most affected countries or in those countries with lesser immunisation coverage. Those countries most economically dependent on tourism will, therefore, experience a twofold negative effect: the first is the dependence on international tourism, with inbound tourism recovering slowly, and the second effect is related to the economic crisis, in turn caused in part by an reliance on tourism. The recovery in domestic demand will also be delayed due to the general economic climate.

2. METHODOLOGY: PROBING INTERVIEWS WITH TOURISM PROFESSIONALS

A qualitative survey was conducted in order to analyze how tourism and hospitality operators were dealing with the consequences of the pandemic. A research group was formed, which included Master's degree students as interviewers. Thereafter, the research group was under the guidance and supervision of Professors of the Master's degree course in *Tourism Systems and Hospitality Management* (LM-49) at the University of Palermo (Italy). Where research is performed into unexpected and major crises, qualitative methods of study can offer fascinating and timely critical insights. Thus, the needs and expectations of the stakeholders in a particular economic sector can be ascertained. The authors of this study, therefore, considered it appropriate to adopt a qualitative research method in the form of semi-structured interviews, which were for the most part conducted on the internet. Furthermore, the authors of this study believe that a qualitative approach is in line with the study objectives: an in-depth analysis of tourism in Sicily in 2020 and the challenges and opportunities arising from the COVID-19 crisis. Given the obligations of social distancing, online and telephone interviews are increasingly used in qualitative research.

With the aim of writing their Master's degree dissertations, a group of students was selected to identify, contact, and interview groups of tour operators. After rigorous training regarding qualitative interview techniques with tourism professionals, each student was entrusted with a particular sector/segment of the tourism market: cultural, luxury, nautical, rural, and agritourism. A single methodological protocol was defined for all sectors: selection of potential interviewees; the sending of a presentation letter, summarizing the rationale and objectives of the investigation; request for an appointment to conduct the interview; an initial sending of questions via email; conducting the interview (online, via social media: Skype, Meet, Zoom, etc; or via telephone); recording of the interview; transcription and sending for an initial verification by the interviewee of the accuracy of the transcription; approval of the transcript of the discussion with the interviewee; and publication of the interview and the specific survey form for each sector/segment.

The interviewees were appositely selected from among the managers of the following: cultural organizations, tour operators, owners or managers of B&Bs, managers or owners of farmhouses, etc. The rationale for this selection was to state their opinion regarding the state of a particular sector/segment and the short- and medium-term consequences, which have been caused by – and continue to be caused by - the pandemic. The characteristics of the interviewees are detailed in Table 1.

Table 1 In-depth interviews were performed from March - December 2020 with various stakeholders and operators in the tourism and hospitality sectors.

AUTHORS	TOURISM SEGMENT	NO. OF PEOPLE INTERVIEWED	TOUR OPERATOR CATEGORIES	PERIOD	COMPANIES (Website)
Genovese, 2020	Cultural	3	Owners or managers	May - July 2020	- Associazione Amici dei Musei Siciliani (http://www.amicimuseisiciliani.it/) - Associazione Terradamare (https://terradamare.org/) - Opera dei pupi Enzo Mancuso (http://www.mancusopupi.it/)
Li Muli, 2020	Luxury	3	Tour operator	March - April 2020	- Essence of Sicily (http://www.essenceofsicily.com/) - Sicilian Journeys (https://sicilianjourneys.com/) - IC Bellagio (https://www.icbellagio.com/)
Martinez, 2020	Nautic	4	Travel agency	June - August 2020	- Triscovery (https://www.triscovery.com/) - Spartivento (https://www.spartivento.it) - ISYBA (https://www.isyba.it/) - Sailsquare (https://it.sailsquare.com)
Montalto, 2020	Bed&Breakfast	4	Owners or managers	May - August 2020	- Il giardino di Laura (https://il-giardino-di-laura-private-rooms-mondello.hotelmix.it/) - Al Tari apartment (https://www.iltaribnb.it/) - House Orlando (https://house-orlando.business.site/) - Aquarooms (http://www.aquarooms.it/)
Morreale, 2020	Bed&Breakfast	7	Owners or managers	May - August 2020	- B&B Opera dei Pupi (https://www.bboperadeipupi.com/) - Sicilybeyondimagination (https://www.facebook.com/Sicilybeyond/) - Storiedipalermo (https://storie-di-palermo.hotelmix.it/) - Casavanzahotelsicilia (https://www.facebook.com/casevacanzahotel sicilia.it/) - Valentina, Roberto, Giorgio: Gestori o proprietari di B&B, attraverso la pagina: https://www.facebook.com/HostAirbnbPalermo
Orobello, 2020	Rural	3	Owners or managers	June - August 2020	- Agriturismo Sant'Agata (http://www.santagatagriturismo.it/) - Agriturismo Parco Vecchio (https://www.agriturismo-in-italia.info/sicilia/palermo/parcovecchio.htm) - Agriturismo Baglio Vecchio (https://bagliovecchio.com/)

Trentacoste, 2021	Slow Tourism	4	Owners or managers	October – December 2020	<ul style="list-style-type: none"> - Associazione Treno D.O.C. (www.trenodoc.com) - Associazione Amici dei Cammini Francigeni in Sicilia (https://camminifrancigenidisicilia.wordpress.com) - Associazione Slow Tourism (www.slowtourism-italia.org) - Palma Nana soc coop (https://www.educazioneambientale.com/)
Total		28			

All the stakeholders, who participated in the study in March - December 2020 period, are based in and/or perform their activities mainly in Sicily. An analysis of the answers revealed the identification of various sub-themes, commencing with the open-ended questions, as posed. For the purpose of content analysis, the responses to the interviews were read several times to interpret and discern similarities and differences in content. This type of systematic thematic analysis is one way by which to recognize and identify recurring themes. The main objective is to describe and understand how people feel, think and behave in a particular context when answering a specific research question. Moreover, it is critical to remain focused when coding the entire dataset before moving on to identifying the sub-themes. Effective encoding is open and inclusive, identifying and labelling all segments of interest and relevance within the dataset.

The responses were encoded in order to highlight similarities, and this was of assistance in limiting the number of sub-themes. The process of encoding some responses led to similar concepts being repeated several times. Examples of this repetition were: *the ability to adapt*, *disagreeing about government policies encouraging economic recovery*, and *uncertainty about the future*. This type of encoding also made it possible to quantify recurring content. Thematic analysis is an effective approach in qualitative studies as it reveals the participants' views and opinions, as relating to the questions asked.

3. RESULTS

Careful observation of the 15 sub-themes led to three dominant themes; they were encoded as *adaptability*, *new security protocols*, and *concerns for the future*. The most critical issue which emerged was *the ability to adapt to the new normal*. This was evident in the way respondents perceived the ongoing crisis, where resilience was seen as a solution to the total disruption of all tourist events. This issue also highlights the need for managers need to become aware of the evolving trends related to sustainability and the slower dimension of travel, which may well become the norm in the hospitality and tourism sector.

Hygiene and sanitation was a recurring sub-theme in all responses, whether it regarded predictable consumer behaviour or some general data regarding the tourist industry. Characterised by seasonal tourism flows and poor public transport infrastructure, the compliance of Sicily with updated health and hygiene regulations is too pressing a fact for the relevant institutions to ignore. Regardless of the type of products and services, managers need to consider creating dedicated task forces in addressing hygiene issues and the related training of employees in the tourism sector.

As gleaned from the survey answers, the idea of *maintaining optimism and hopes for recovery* was observed to be of overriding importance. This was particularly evident with responses related to the development of "new" tourism strategies and adapting to the new post-COVID-19 normal. Such an optimistic view may be attributed to the fact that many tourism operators would

have experienced the vicissitudes of the tourism industry in recent times. Based on the survey responses received, it seems clear that there is an overwhelming need to formulate national standards for tourism and hospitality businesses. And the enforcing of these standards must be effected in a rigorous manner.

Many participants in the survey provided conflicting views regarding the political response to the pandemic crisis: some praised the role of the Italian government in their handling of the COVID-19 epidemic, while others expected the assistance to be more effective and rapidly available. Furthermore, the Italian government's management of the crisis is one of many recurring issues among those highlighted by the interviewees. Massive job losses and the weakening of the contribution of tourism sector to GDP are inevitable, and requests for financial assistance are increasing. Many participants in the survey acknowledged that emergency funds had become a major source of income for the industry. Answers related to digitization and the need to engage in online interaction were also frequently reported. Many managers stressed the need to adopt ICT technologies to establish and maintain virtual connections in the industry, and to minimize physical contact with potential customers. Contemporaneously, the use of various social media platforms to maintain contact with the end customer at all points on the tourist journey was identified by one interviewee as: "the perfect welcome at the time of COVID-19". And, finally, often the interviewees recognized the current phase as an epic "struggle", highlighting the difficulties of keeping their companies afloat. This was the case even in the presence of a drastic reduction in revenues and expenses, which are related to occupational maintenance.

3.1. Analysis by tourism segments

Luxury tourism (Li Muli, 2020)

As a new strategy for 2021, operators in the luxury sector have identified the emergence of new markets, predominantly with a younger clientele. This need has arisen from the fact that it is assumed that this 25-50 year old cohort will be the first to resume their travels. And, all interviewees identified three main themes regarding future challenges: *the importance of security, privacy, and the uniqueness of the product/service offered*. Finally, an analysis of the interviewees' opinions and strategies regarding the more salient issues of the new normal is of interest to scholars in the field of tourism studies. Some interviewees identified *reliability* and *financial security* as new elements to be taken into consideration when choosing a tour operator. Others believe that communication with the client before, during, and after the holiday will be considered a critical advantage. And, in this period of uncertainty, social media is indispensable for maintaining a communication channel with the customer.

Rural tourism (Orobello, 2020)

The responses from a sample of three establishments in the agritourism sector in Sicily were rather uniform. At the time of the survey (2020), all respondents had invested financially in their companies and they believed that rural tourism was a growing sector in Sicily. The interviewees shared concern for the future and general distrust in government measures: indeed, only one operator had opted to benefit from government aid, while two other respondents did not consider themselves to be sufficiently informed to take commercial decisions or they felt that they misunderstood the government's actions. In the months following the survey interviews, the Italian government relaxed some lockdown restrictions, thereby encouraging a partial recovery of the tourism sector. In an interview, Coldiretti Sicilia (the Italian Farmers' Association) defined 2020 as "the year of rural tourism" because the registered agritourism sector was at full capacity in August of that year, despite the absence of foreign tourists from the USA and Malta.

Tourism in Bed & Breakfast facilities (Montalto, 2020; Morreale, 2020)

All operators closed their facilities during the lockdown period, as was observed from the responses received from the hosts and owners of Bed & Breakfast facilities. Furthermore, the prices of B&Bs on reopening were unchanged as none of the operators wished to devalue their services. The B&B operators also perceived that the clientele type had changed in "attitude" and "spirit" as an effect of the COVID-19 pandemic, with bookings only increasing from August 2020 onwards. Finally, it must be emphasized that all the B&B operators faced the pandemic emergency by declining any Italian government aid, which may have been available.

Nautical tourism (Martinez, 2020)

The survey interviews confirmed that the most affected niche in the nautical tourism market was luxury nautical tourism. The effects of the pandemic have all but destroyed this sector, especially the Italian market. The reasons are various and not easily discernible; in part, political and economic aspects have apparently instilled fear and mistrust in the end consumer. Many of the survey participants gave credence to the importance of digitizing their services in increasing their competitiveness, particularly in the 2020 period. This is because charter companies sales are accrued via tour operators or brokers, all of whom suffered a significant downturn in revenues.

Cultural tourism (Genovese, 2020)

As could be seen from survey answers relating to the cultural sector, all survey participants have demonstrated remarkable resilience in the face of the 2020-2021 pandemic: each interviewee had a Plan B, which with to resist the adverse effects of the crisis. Many believe that any economic recovery will last for years, at least until effective immunisation programmes are available to all and accepted by many. On the one hand, an effective tool to assist in an economic recovery is to create cultural events to attract participants. On the other hand, many operators in the tourism sector are discouraged and frustrated at the uncertainty about the economy, which is often associated with Italian politics and economic matters. The vast majority of survey respondents are experiencing feelings of isolation. Many tourism operators believe that the Italian government and local authorities should focus efforts on providing concrete measures to relaunch the cultural and tourism sectors.

4. CONCLUSION

The COVID-19 pandemic is a natural, but also a socio-political and economical disaster. Moreover, it could be identified as a crisis, if the focus is on the political and economical facts. Indeed, urbanization and globalization drove the rapid spread of the virus, but tourism plays a role in amplifying the public health crises (Wut et al., 2021; Abbas et al., 2021, Zenker and Kock, 2020).

As already analyzed by Zenker and Kock (2020) what is largely missing in the literature is theory-based research that sets out to investigate how tourism could be different in a post-COVID-19 era. Also it is said, in the article "The Evolutionary Tourism Paradigm" by Kock, et al. (2020), that sentences like 'things will never be the way they used to be' are often heard after crises but mostly proved wrong and repetitive as we go back to our normal life-routines. However, this time some aspects of our life will change forever. Usually, in science these moments are the most relevant ones, because they lead to a change in our world-view (Qiu et al., 2020).

This study, in line with the findings reported by Sharma, Thomas and Paulc (2020), outlines different factors for building resilience in the tourism industry: government response, technology innovation and consumer and employee confidence. The common goal for both studies is to underline that the tourism industry may transform into a new global economic order characterized by sustainable tourism, society's well-being and the involvement of local communities.

In the specific, various final considerations can be gleaned from the survey interviews and an analysis of the relevant data. On the tourist demand side, it is probable that there will be greater attention expected by the tourist to aspects relating to health and hygiene. Of greater value than in

the past are elements of choice, for example: the choice of accommodation facilities, and the adoption and compliance with precise protocols and standards of cleaning and hygiene. It is also likely that tourist demand will be directed (more so than in the past) to specific tourism segments, such as: single travellers and walking holidays; trips incorporating more meditative and wellness activities; trips and holidays with friends and relatives to recuperate moments lost during lengthy periods of social distancing; shorter trips (time) of shorter distances to regain consumer confidence, thereby minimizing the challenges of longer, multi-centre holidays; and travel and holidays linked to culinary experiences and enogastronomic tourism.

On the supply side, some trends may or should be considered as elements of resilience and reaction/response factors to the pandemic crisis:

- greater attention should be paid to product innovation (and more significant consideration of aspects related to environmental sustainability, quality, and safety), not merely health, of tourism products and services;
- there should be more effective use of ICT to improve supply flexibility and minimise the gap between supply and demand;
- greater attention should be paid to communication and customer relations, also via mass media, social media, and all those new channels of online communication; this also includes greater use of peer-to-peer (P2P) digital platforms to provide SMEs with access to the global tourism market;
- the search for innovative technological solutions should continue in order to facilitate access to tourism products and services and/or usable in an alternative way to traditional methods;
- emphasis should be placed on promoting internationalization, which can intercept (even when demand falls) those overseas countries and tourist segments which are/will be more able to support the level of international demand;
- effort should be directed to orientating specific tourist segments and offering specialization to the tourist market;
- there should be greater integration (vertical and horizontal) between the various levels and actors of the tourism market; in particular, more effective interaction between small businesses in the same sector with an aim of improving their ability to meet the ICT and relational challenges in financing and interpreting change more effectively;
- there should be more attention paid to employee training and interpersonal skills, including heightened sensitivity regarding professionalism towards the customer; and
- Finally, greater attention should be paid to data collection and decisions based on empirical evaluation by operators working in the tourism sector (customer profile, customer data management, and demand segmentation).

Based on the study conducted to understand the Sicilian tourism industry in the context of COVID-19, we suggest a resilience and sustainable framework for the industry. We argue that with the collaboration of government, stakeholders and the workforce employed in the industry, the tourism sector may end up evolving in a much more sustainable way. Importantly, the COVID-19 pandemic underlines that the tourism sector has to be understood in the greater global economic and political context that will define it in the future.

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